



ATTENTION

Probate cases on this calendar are currently under review by the probate examiners. Review of some probate cases may not be completed and therefore have not been posted.

If your probate case has not been posted please check back again later.

Thank you for your patience.

Petition for Removal of Trustee and to Appoint Successor Trustee [Prob. C. 15660,
17200(b)(10), 17201]

			DONNA K. ISAAK is Petitioner.	NEEDS/PROBLEMS/COMMENTS: 1. Need Order
			Petitioner states on 3/30/2005, JOHNNY H. ISAAK , ("settlor") created the JOHNNY H. ISAAK FAMILY TRUST.	
Cont. from				
	Aff.Sub.Wit.		The trust designated Settlor as the original trustee of the Trust.	
✓	Verified			
	Inventory		Settlor is the only person currently entitled to distributions of principal and income from the Trust estate. Upon the death of the Settlor, the Trust estate will be divided among four persons: Settlor's spouse, Tamara Garibiants, Settlor's daughters, Lynn D. Medina and Petitioner and Settlor's son, Robert J. Isaak.	
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail	W/		
	Aff.Pub.			
	Sp.Ntc.		Section XI of the Trust instrument provides, in pertinent part, "If the original Trustee shall for any reason cease to act as Trustee, Robert J. Isaak, shall act as Trustee. If said Trustee shall for any reason cease to act as trustee, Donna K. Isaak, shall act as Trustee."	
	Pers.Serv.			
	Conf. Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video Receipt		On 5/30/12, Settlor executed the First Amendment to the Trust. Section XI was amended to state, if the original Trustee shall for any reason cease to act as Trustee, Donna K. Isaak, shall act as Trustee. If said Trustee shall for any reason cease to act as trustee, Robert J. Isaak, shall act as Trustee.	
	CI Report			
	9202			
	Order	X		
	Aff. Posting			
	Status Rpt			
	UCCJEA		Petitioner states Settlor who has been acting as Trustee pursuant to the terms of the Trust and the First Amendment to the Trust, has been diagnosed with dementia and now resides in a care facility. According to Settlor's physicians, he is no longer competent to make financial decisions (See exhibit C and Exhibit D).	
	Citation			
	FTB Notice		Petitioner requests the Court remove Settlor as Trustee on the grounds of his incapacity and appoint Petitioner as Successor Trustee.	

Reviewed by: KT

Reviewed on: 1/25/13

Updates:

Recommendation:

File 1 - Isaak

**Petition for Probate of Will and for Letters of Administration with Will Annexed;
 Authorization to Administer Under IAEA (Prob. C. 8002, 10450)**

DOD: 07/27/11	TOMI ROMAN , niece/named Executor without bond, is petitioner.	NEEDS/PROBLEMS/COMMENTS: 1. Need Affidavit of Publication. 2. Need <i>Notice of Petition to Administer Estate</i> and proof of service by mail at least 15 days before the hearing of the <i>Notice of Petition to Administer Estate</i> on: -Jacquelyn Brase -Gary Brase -Michael Roman -Any other interested party 3. Need Order/Letters. 4. Either Item 5(a)(7) or (8) should be checked regarding issue of a predeceased child. 5. Item 8 of the Petition is to include the names, relationships to decedent, ages and addresses of all persons mentioned in decedent's will and all persons named or checked in items 2, 5, 6, and 7. 6. It does not appear that the original will has been deposited with the Court. Need original will pursuant to Probate code § 8200. <u>Note:</u> If the petition is granted status hearings will be set as follows: • Friday, 06/28/13 at 9:00a.m. in Dept. 303 for the filing of the inventory and appraisal and • Friday, 03/28/14 at 9:00a.m. in Dept. 303 for the filing of the first account and final distribution. Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.
	Full IAEA – NEED	
Cont. from	Will dated 03/10/03	
<input type="checkbox"/> Aff.Sub.Wit. s/p	Residence: Fresno	
<input checked="" type="checkbox"/> Verified	Publication: NEED	
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input type="checkbox"/> Notice of Hrg x	<u>Estimated Value of the Estate:</u>	
<input type="checkbox"/> Aff.Mail x	Personal property - \$ 92,000.00	
<input type="checkbox"/> Aff.Pub. x	Real property - 92,000.00	
<input type="checkbox"/> Sp.Ntc.	Total - \$184,000.00	
<input type="checkbox"/> Pers.Serv.	Probate Referee: RICK SMITH	
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters x		
<input checked="" type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input type="checkbox"/> Order x		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		

Petition for Probate of Will and for Letters Testamentary; Authorization to
Administer Under IAEA (Prob. C. 8002, 10450)

DOD: 03/12/12		SUSAN J. TEMPLETON , named alternate Executor without bond, is Petitioner. Full IAEA – OK Will dated 09/15/2000 Residence: Clovis Publication: The Business Journal <u>Estimated Value of the Estate:</u> Real property - \$65,000.00 Probate Referee: STEVEN DIEBERT	NEEDS/PROBLEMS/COMMENTS: <u>Note:</u> If the petition is granted status hearings will be set as follows: • Friday, 06/28/13 at 9:00a.m. in Dept. 303 for the filing of the inventory and appraisal <u>and</u> • Friday, 03/28/14 at 9:00a.m. in Dept. 303 for the filing of the first account and final distribution. Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.	
Cont. from				
<input type="checkbox"/>	Aff.Sub.Wit.			s/p
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail			w/o
<input checked="" type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			
<input type="checkbox"/>	Conf. Screen			
<input checked="" type="checkbox"/>	Letters			
<input checked="" type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
			Reviewed by: JF Reviewed on: 01/22/13 Updates: Recommendation: SUBMITTED File 3 - Woore	